

District of Columbia Retirement Board (DCRB)

Request for Proposals for Benefits Staff Training Services

Solicitation Number: DCRB-13-014



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900 7th Street, N.W. Second Floor, Washington, DC 20001

District of Columbia Retirement Board
Request for Proposals for Benefits Staff Training Services

Executive Summary
(Please Limit Response to One Page)

Firm Name: _____

Address: _____

Telephone
Number: _____

Contact
Person: _____

Email: _____

Training
Team: _____

Why should the District of Columbia Retirement Board retain your firm to provide employee training services? Please summarize your firm's strengths in the space provided.

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A. OVERVIEW

The District of Columbia Retirement Board (DCRB), an independent District of Columbia government agency, is a retirement system that manages assets in excess of \$5 billion of the Teachers' Retirement Fund and the Police Officers and Firefighters' Retirement Fund (the "Funds") on an actuarially sound basis and manages retirement and post-employment benefit programs for participants and beneficiaries of those Funds. The DCRB works closely with various external agencies in administering retirement benefits and disbursements, most notably the U.S. Department of Treasury's Office of District of Columbia Pensions (ODCP) in conjunction with the Bureau of Public Debt (BPD).

The agency is comprised of approximately 42 employees that provide services to approximately 24,000 active and retiree plan participants. In recent years, the DCRB has instituted multiple changes, including shifts from manual to automated processes and other changes in staffing and strategic direction. As DCRB continues to evolve, the profile and needs of the customers served by the agency will change, calling for the consistent use of effective customer service, technology applications and communications by all members of the staff.

DCRB seeks to provide training to its Benefits department consisting of approximately 18 staff (including its managers) in an effort to enhance the effectiveness of the agency. DCRB considers ongoing training necessary to meet agency current and future business objectives. The focus for training is a two-month period. DCRB's initial overall objective for the training effort includes:

Microsoft Word- Staff must be trained on Microsoft Word 2010. Training must be hands-on and interactive with each staff member working on a PC during training.

Training curriculum must at a minimum include the following:

- a. Formatting letters;
- b. Changing fonts and font sizes;
- c. Indentation of paragraphs;
- d. Line spacing;
- e. Custom margins and margin justification;
- f. Headers and footers;
- g. Pagination;
- h. Mail merges;
- i. Printing envelopes and labels;
- j. Using track changes and new comments; and
- k. Checking spelling and grammar.

Training must address users of varying skill/knowledge levels. Offeror shall provide a skill set achievement chart that indicates skill levels (beginners, intermediate and advance) and what competencies should be obtained by class participants at each level.

Participants must be trained to obtain skills/knowledge at an intermediate level.

Microsoft Excel- Staff must be trained on Microsoft Excel 2010. Training must be hands-on and interactive with each staff member working on a PC during training.

Training curriculum must at a minimum include the following:

- a. Performing calculations (summing, averaging, calculating median values, rounding, if/then statements, pagination, headers/footers);
- b. Cell/column/ row size adjustment;
- c. Text wrapping;
- d. Creating template worksheets;
- e. Formatting tables; and
- f. Copying and pasting Excel tables into Word documents.

Training must address users of varying skill/knowledge levels. Offeror shall provide a skill set achievement chart that indicates skill levels (beginners, intermediate and advance) and what competencies should be obtained by class participants at each level.

Participants must be trained to obtain skills/knowledge at an intermediate level.

Business Communications- Training must include the importance of communicating the DCRB “brand” as provided by DCRB Benefits management to include: importance of professional communications; DCRB’s standards for communications; letterhead and logo usage; and signatures – when to use them.

Staff must be trained in writing, to include internal and external communications (i.e., email, memorandums, form letters, etc.) including but not limited to the following:

- a. Common grammatical rules (their vs. there, it’s vs. its, etc.)
- b. Punctuation rules common to business letters;
- c. Word choice common to business letters;
- d. Proper formatting and spacing; and
- e. Clear understanding that personalizing any type of business communication is not acceptable.
- f. Writing a professional email;
- g. Using tactful communication;
- h. When to reply, who to CC, how to reply to all on an email, etc.;
- i. Accepting Outlook meeting invites; calendar scheduling
- j. What information to provide via email (DCRB policies); and
- k. How to include an attachment in an email.
- l. How to use form and template letters

Customer Service – This training should assist agency employees in the development of this critical competency and focus on areas such as assisting the customers (both internal and external), listening for facts, asking effective questions, reaching out to customers and being sensitive to their needs, and providing professional responses to their inquiries. Additionally, this training should provide tools for employees handling difficult customers, tactical communication strategies, and creating a customer service culture.

After contract award, DCRB will provide the offeror with a series of pre-recorded calls by DCRB staff for their review. These recordings shall establish the baseline customer service currently performed. The customer service training must meet the following requirements:

- 1) Defining good customer service.
- 2) Telephone etiquette.
 - a. What is and is not appropriate when representing DCRB
 - b. Screening calls and taking messages.
 - c. Hold and Transfer procedures (including courteous hold/transfer)
 - d. Handling calls from New Members
 - e. Vocal Tone
 - f. Handling difficult calls/complaints
- 3) Handling emotions in dealing with members.
- 4) Listening strategies.
- 5) How to take the extra step in providing service.
- 6) Follow-up policies (i.e. when to call, send a letter, how to document all calls, etc.)
- 7) Training must include role play with staff members in a classroom environment.
- 8) One-on-one, trainer observing staff person at their desk in a live situation.
- 9) How to anticipate an issue or identify a question that is pertinent but not asked by the caller.
- 10) When to escalate an issue or transfer a call
- 11) How to identify issues that may affect others (potential global problems)
- 12) The importance of rapid, efficient, thorough follow-up, documentation and tracking.

B. Scope of Services

The Offeror must meet the following requirements for staff training for approximately 18 employees:

- a. Conducted on-site at DCRB with agency's equipment.
- b. The offeror shall provide structured class sessions for each of the four main areas of study. Class sessions attendance shall not exceed nine (9) people per class.
- c. Classes shall be between two and four hours per day per staff member.
- d. Total instructional hours shall not exceed forty hours per staff member.
- e. The syllabi must be developed by the contractor in collaboration with the DCRB Benefits Department management and the DCRB contractor Linea Solutions. The DCRB Benefits Department management shall have final review and approval for the syllabi.
- f. Offeror must provide course completion testing to staff to ensure they have reached a competency in the course materials.
- g. Trainers must have a minimum of three (3) years of experience providing similar training in any of the four main areas of study, as demonstrated by resumes provided by the offeror.

- h. Nationally recognized certification or educational degrees in any of the four main areas of study is preferred.
- i. Upon completion of training, the company must provide Benefits Department management with a report detailing staff participation/non-participation, specific strengths/weaknesses and overall progress in knowledge/skill levels.

DCRB is seeking a contractor to develop and provide classroom curriculum based training for the four main areas of study. Required instruction shall include the following:

- 1) Microsoft Word: All Benefits department staff
- 2) Microsoft Excel: All Benefits department staff
- 3) Business Communications: All Benefits department staff
- 4) Customer Service: All Benefits department staff

DCRB will provide the training facilities, software and equipment needed to perform the required training.

The DCRB will provide appropriate documentation and information as referenced in this solicitation to the successful Contractor after contract award.

C. Deliverables

Meeting/Reporting	Format	Schedule	Comments
Develop Syllabi for all main areas of study	MS Word	15 days after contract award.	See Section B. (e)
Training Completion Report	MS Word	5 days after last class.	See Section B. (i)

D. Minimum Qualifications and Proposal Requirements

Proposals should be as succinct as possible while providing an accurate picture of the firm's ability to meet the needs of DCRB in a thorough, accurate, responsive and cost-effective manner. Each proposal must contain the following elements:

Transmittal Letter and Minimum Qualifications

Within the transmittal letter, the proposing firm must include the following:

- 1) The history of your firm in terms of the type of training services provided. Include the description of services, volume of services, recent client reference list (from past 2 years, minimum of 4 clients) and attached client evaluations. In relation to each client listed as a reference, provide: a) the contact name, b) phone number, c) the number of participants trained, and d) the content of programs administered.
- 2) Your firm's specific ability to provide this employee training service to DCRB. Outline your firm's ability to tailor instruction and materials to the specific needs of this RFP.

Understanding of the Services Needed

In this section, describe your understanding of the services covered by this RFP. Please provide DCRB with information, not exceeding four pages, regarding your approach and methodology to the scope of work outlined in the RFP as follows:

- 1) Course descriptions. (Based on requirements in sections A and B, provide detailed course descriptions, including what subjects are covered and how training is conducted. Include a description of the deliverables provided during training, as well as a description of how testing is performed to ensure concepts are understood. Description of reports provided to management that detail how staff is performing and mastering the materials.)
- 2) Service plan. (Based on requirements in sections A and B, provide a proposed work plan, including a proposed schedule, hours, duration, courses by trainer, etc.)
- 3) Customized approach. (Describe how courses will be customized to meet DCRB's needs. Describe process for developing custom content.)
- 4) DCRB requirements. (Describe what DCRB must do in order to make training successful. Include who needs to participate from management, the approximate level of effort from management, tools, workspace, and any other requirements from DCRB.)

Professional Staff

In this section, describe the experience of the individuals who will be assigned to the DCRB account. Provide a resume and the last three client evaluations for each member of your firm who will provide training as a result of contract award. Document specifically any and all training provided in a transitional firm, governmental entity, and with diverse personnel.

Firm History and Operations

Please address the following questions regarding your firm:

- 1) How many years has the firm been providing training services?
- 2) Please identify the location of the primary office that will provide services for DCRB.
- 3) Describe the ownership structure of the firm, including the relationships of each branch office to the branch offices and to the headquarters. Identify the individual who has overall responsibility for the firm's operations. Please disclose any conflicts of interest that may exist in performing services to DCRB.

References

List at least three (3) recent references for similar training services performed in the last five (5) years. Experience with public entities is preferred. For each reference listed, include client name, address, and telephone number and name of a contact person. Please state those clients who have worked with the specific trainers who will be assigned DCRB as a client.

E. Submission of Proposals

Two (2) originals and six (6) copies of the technical proposal, and one (1) original and two (2) copies of the price proposal shall be submitted in two parts, titled "Technical Proposal" and "Price Proposal." Proposals shall be typewritten in 12 point font size on 8.5" by 11" bond paper. In addition, proposals shall be submitted electronically via USB thumb drive. Telephonic, telegraphic, and facsimile proposals will not be accepted. Each proposal shall be submitted in a sealed envelope conspicuously marked: "Proposal in Response to Solicitation No. DCRB-13-014 – RFP for Benefits Staff Training Services". **Please note that each proposal is limited to a maximum size of 25 MB.**

All electronic attachments shall be submitted as a .pdf file. DCRB will not be responsible for corruption of any file submitted. If the submitted file cannot be viewed and printed as submitted, it will not be considered. The offeror shall appropriately label each attachment, i.e., "Technical Proposal", "Price Proposal."

Offerors are directed to the specific proposal evaluation criteria found in Section F of this solicitation, Evaluation Criteria. The offeror shall respond to each factor in a way that will allow the District to evaluate the offeror's response. The offeror shall submit information in a clear, concise, factual and logical manner providing a comprehensive description of training supplies, services, and delivery thereof. The information requested for the technical proposal shall facilitate evaluation for all proposals. The technical proposal must contain sufficient detail to provide a clear and concise response fully reflecting the manner in which the offeror proposes to fully meet the requirements in Sections A and B.

The Offerors shall complete, sign and submit all Representations, Certifications and Acknowledgments as appropriate.

Offerors should submit their proposals to:

Mailing and Delivery Address

Yolanda Smith
District of Columbia Retirement Board
900 7th Street, NW
Second Floor
Washington, DC 20001

Proposals must be received by:
March 26, 2013, 2:00 p.m., EST

Proposals become the property of DCRB upon submission and may be subject to public disclosure under the D.C. Freedom of Information Act (FOIA). Offerors must expressly identify any information contained within the proposal that they consider proprietary and confidential.

All cost for developing proposals is entirely the responsibility of the firm and shall not be chargeable to DCRB. DCRB accepts no responsibility for lost or late delivery of proposals.

Questions

Questions about the Request for Proposals must be submitted in writing by 5:00pm EST March 18, 2013 via email to Yolanda Smith at Yolanda.Smith@dc.gov.

F. Evaluation Criteria

Only proposals that meet the Minimum Qualifications will be evaluated. The evaluations may take place in two phases. Phase one will involve review of written proposals. Phase two may involve interviews and/or demonstrations with representatives of DCRB that will make the final selection. In both phases of the selection process, technical proposals will be evaluated using the following criteria:

Criteria
Offeror's Experience – past performance, expertise and experience providing similar training as described in Section D of this solicitation.
Quality of Personnel – Offeror will be evaluated on personnel proposed for this engagement that meet the experience, education and certification requirements specified in Section D of the solicitation.
Syllabi – Offeror shall be evaluated on the syllabus for each area of study.

Local, Small, and Disadvantaged Business Enterprise offeror will receive preference points. (Proposal must include documentation of current certification of registration under District law (D.C. Official Code Section 2-217.04 (2001) at the time of submission).

DCRB intends to award a single contract resulting from this solicitation to the responsible offeror whose offer conforming to the solicitation will be most advantageous to the DCRB, cost or price, technical and other factors, specified elsewhere in this solicitation considered. Award will be made to the Offeror whose offer is judged to be an integrated assessment of the evaluation criteria to be the most advantageous to DCRB based on technical merit and price; and that DCRB deem responsible.

Best Value Determination is based on the technical merit of the proposal and is significantly considered more than price. The price must be fair and reasonable. DCRB may select other than the lowest price proposal if it is determined by value analysis, or technical/cost tradeoffs, that the proposals become more technically equivalent, then price becomes more important

- (a) Offerors are advised that award may be made without discussion or any contact with the offerors concerning the offers received. Therefore, offers should be submitted initially on the most favorable terms that the offer can submit.
- (b) Price evaluation will be based on the sum of the total estimated prices of the base contract and any options.
- (c) Affordability. The price proposals will be assessed for affordability. DCRB will not make an award for any proposal which proposes prices that would render the procurement infeasible.

TECHNICAL EVALUATION RATING

Each evaluation criteria will be rated using the Adjectival scoring method as follows:

<u>Adjective</u>	<u>Description</u>
Unacceptable	Fails to meet minimum requirements; e.g., no demonstrated capacity, major deficiencies which are not correctable; offeror did not address the evaluation criteria.
Marginal	Fails to meet evaluation standard; however any significant deficiencies are correctable. Lacks essential information to support a proposal.
Acceptable	Meets requirements; weaknesses are correctable.
Exceeds	Exceeds most, if not all requirements; no deficiencies.

Definitions for Technical Evaluation

Clarifications: Communications with an Offeror for the sole purpose of eliminating minor irregularities, or apparent clerical mistakes in the proposal. Unlike discussions, clarifications do not give the Offeror an opportunity to revise or modify its proposal, except to the extent that correction of an apparent clerical mistake results in revisions.

Discussions: Oral or written communications including negotiations between DCRB and the Offeror (other than clarifications) that; involves information essential for determining the acceptability of the proposal or to cure identified defects in the proposal.

Deficiencies: Defect in the proposal which preclude acceptance. Involves any part of the Offeror's proposal which would not satisfy DCRB's minimum requirements established in the solicitation. Includes failures to meet specifications, submit information or questionable technical or management approaches. Items disclosed during discussions,

are evaluated in two categories: material-basis for rejection because further discussions would be meaningless; curable – may be corrected by clarifications or discussions and brought into the competitive range.

Weakness: Includes ambiguities, lack of complete descriptions, error in interpretation, omission of essential information, inadequate information, all of which are considered curable in discussions. An excessive number of clarifications may in itself constitute a weakness.

Strengths: Elements of the proposal that meet or exceed the minimum requirements of the solicitation and provide an identified benefit to DCRB.

G. Fees for Services

Offerors shall provide in their price proposals in a fixed fee in table format outlining the Contract Line Item (CLIN) for each of the following:

CONTRACT LINE ITEM NO. (CLIN)	Item Description	Hourly Rate	Total Fee Per Course
1001	Microsoft Word 2010 Training		
1002	Microsoft Excel 2010 Training		
1003	Business Communications Training		
1004	Customer Service Training		
Total Fee			

Offerors must address the following in support of their proposal in narrative:

- (a) Fee structures for other public agency clients and any reduced fees offered to other municipalities, governmental entities or nonprofit firms.
- (b) Information on how you propose to keep track of, and charge for, any expenses. (Incidental office expenses will not be reimbursed for this work. No fees or expenses will be paid for travel time or mileage, except in cases when the travel is required by DCRB and the round-trip travel exceeds 50 miles). Include in your proposal any assumptions on which your hourly fee is based.
- (c) A certification that the proposed hourly rates do not exceed the lowest hourly rates charged to any entity of the District of Columbia or any Federal, State, or local government entity for performing similar types of work.
- (d) A certification that if, subsequent to award of a contract, hourly rates charged to any District of Columbia, Federal, State, or local government entity for performing similar types of work become lower than the hourly rates specified in the contract, the contractor shall promptly notify the Board and substitute the lower hourly rates for all future work.

H. DCRB Schedule of Events

RFP Released: March 12, 2013

Proposals Due: March 26, 2013

I. Miscellaneous Provisions

The DCRB reserves the right to cancel this RFP at any time and to reject any and all proposals submitted in response to this RFP, if the DCRB determines such action or actions to be in the best interest of DCRB.

DCRB also reserves the right to request clarification of any submission, modify or alter the Scope of Services and solicit new submissions, reject any or all submissions, and waive immaterial irregularities in any submission. **DCRB does not intend to entertain limited liability clauses of any type with the offeror selected.**

During contract formation, if DCRB or its agent is unable to agree to contract terms with the candidate receiving the highest evaluation in this RFP process, DCRB reserves the right to terminate contract negotiations with that candidate. In the event of such an impasse, DCRB may contract with the candidate receiving the next highest evaluation.

When the Board commences search procedures for the retention of an outside service provider (including but not limited to investment managers, attorneys, consultants, accountants, auditors, actuaries, etc.), in order to protect the integrity of the decision making process and to avoid any and all appearances of conflict, Board members, as well as senior staff, shall refrain from having any intentional, unauthorized contact with such service providers, other than for ordinary and necessary business purposes (e.g., administration of an existing contract), as a matter of public record, or unintended incidental interactions. This provision is in effect upon distribution to the Board of potential qualifying candidates for review until the Board awards the contract or the RFP is withdrawn. Offerors will be notified when the lock-out period commences. The lock-out restriction is in addition to other provisions in this RFP prohibiting contact between offerors and Board members or staff. **Offerors, who initiate contact with Board Trustees or staff, other than as provided in this RFP, may be disqualified from this procurement.**